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ABSTRACT

Findings of a study that examined the application of strategic planning in American school districts are presented in this paper. Methodology involved content analysis of the strategic plans of 79 school districts throughout the United States, focussing on their mission statements, core beliefs and parameter statements, and objectives and strategies. Findings indicate that school districts do not distinguish in practice among the technicist, political, and consensual planning processes. Conclusions, supplemented by a survey of the school districts, are that: (1) interactive planning methods need an organizational context that supports continued dialog; (2) strategic planning appears to be a useful tool for school-community communication; (3) most districts' interactive planning models exhibited an incongruence between mission statements and strategies; (4) the planning process contained inherent conflicts of interest; and (5) a fine line exists between political and rationalist elements in strategic planning. Six figures are included. (Contains 42 references.) (LMI)

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Strategic Planning in Practice: An Analysis of Purposes, Goals, and Procedures

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Overview of the Study

This study provides insight into the application of strategic planning in American school districts. Through the collection and analysis of 79 strategic plans from districts throughout the nation, patterns are discerned regarding the application of this planning technology to school districts. This analysis is the second in a two-part presentation of these data. Part one reported data from a survey of the districts that submitted plans for this study, and ascertained the perceptions of educators in those districts regarding the effectiveness of strategic planning (Conley 1992). This paper presents an analysis of the plans themselves, focusing on the mission, core beliefs and parameters statements, the objectives and strategies selected. It examines the congruence between the values and goals espoused in the mission and beliefs, and the specific strategies identified, to achieve these values and goals.

This study provides a profile of strategic planning practices in order to facilitate better understanding of its use, to consider strategic planning in relation to concepts and theories of planning in education and other organizational contexts, and to provide a platform upon which further research on strategic planning in education may be conducted.

Conceptual Framework of the Study

The emergence of strategic planning as a planning technique for school districts is a relatively recent development. Although it has been practiced widely in the private sector during the past thirty years, it was not applied to any significant degree in education before the early 1980s, and has only become common as a planning tool for school districts during the past five years (Clark 1990).

There is little research that documents the arrival of strategic planning in education. Studies conducted in the seventies (Colucciello 1978, Goldman and Moynihan 1975) and as recently as 1983 (Schmelzer), indicated that intermediate and long-range planning had not reached a formalized level in most districts, and that there was a lack of understanding among educators regarding the scope and complexity of intermediate and long-range planning (Bozeman and Schmelzer 1984). The term "strategic planning" does not appear in educational publications much before 1985.

It can be hypothesized that the application of these techniques has resulted in part from public educators' perennial interest in private sector techniques, combined with increasing pressure for reform, revitalization and restructuring of

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American education.[1] There is ample evidence, however, that numerous school districts have adopted strategic planning as their primary means of analysis, improvement and goal-setting. McCune (1986) estimated that approximately 500 school districts were engaged in some form of strategic planning in 1986. In most cases it replaced an ad hoc system of short-range objectives and general long-range plans.

DiMaggio and Powell (1983) contend that organizations in a structured field, such as education, "respond to an environment that consists of other organizations responding to their environment, which consists of organizations responding to an environment of organizations' responses."[2] This leads to a standardization of practice and increasing bureaucratism. Strategic planning may be an institutional isomorphic response by educators, as they attempt to emulate a practice without a clear understanding of its purposes and limitations. As more states require districts to engage in strategic planning (e.g., Pennsylvania, Arkansas, Georgia, Utah), the issue of how educators understand strategic planning conceptually as well as how they operationalize it will become more important.

Will strategic planning become another case of organizations responding to an environment of organizational responses? Analyzing recent planning efforts helps determine the ends to which the planning process are being put, and the outcomes that are being produced. This helps identify present trends and provides a benchmark against which future implementation can be measured. Additionally, examination of strategic planning in relation to rational, incremental, mixed-scanning, general systems, and learning-adaptive models of planning (Wilson 1980) helps to discern the operationalization of strategic planning *de facto* by educators, independent of the rhetoric of consultants who espouse strategic planning.

Strategic planning is being relied upon by an ever increasing number of school districts and state systems of education as their primary tool for restructuring their educational system. It is seen as the means by which the educational system can be directed to new, more specific goals, and by which public education can be transformed with relatively little conflict. These are great expectations. Given such expectations, it is critical to look closely at the ways in which strategic planning is being implemented by the "early adopters" throughout the nation.

Strategic Planning in the Educational Context*

Strategic planning techniques, as applied in education, seek to place goal-setting in a broader context, so that key stakeholders inside and outside of the organization are involved in the process. This creates greater awareness and ownership of the goals that result. All employees and constituencies are then able, if they choose, to align their behavior with the goals to enhance their achievement.

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[1] See for example: National Commission on Excellence in Education, 1983; (Goodlad, 1983)Goodlad, 1983; (The Holmes Group, 1986); (National Governors' Association Center for Policy Research and Analysis, 1986)National Governors' Association Center for Policy Research and Analysis, 1986; (Lewis, 1989); (Conley 1991).

[2] The quote is a paraphrase by the authors from Schelling, 1978.

* The following section appeared in an expanded form originally in Conley, David. *Strategic Planning for America's Schools: An Exploratory Study.* Paper presented at the annual conference of the American Educational Research Association, San Francisco. 1992. ED345-359

The proponents of strategic planning also present it as the best, perhaps the only, method that school districts can use to restructure. The literature promoting strategic planning for schools links its use with restructuring and fundamental change consistently.[3]

Bill Cook, a national consultant on strategic planning, outlines the rationale for strategic planning by any organization in his book, Strategic Planning for America's Schools (1988), then considers its application to schools in particular. He contends that the increasing popularity of strategic planning with educators "is a clear indication that strategic planning is an idea whose time has come in public education."

Cook states that with the increasingly rapid rate of change only one type of leadership will be able to survive and prosper: "In short, it's the kind of leadership that plans strategically," and that incremental change in education won't work any longer: "(W)hat is required is a fundamental change in the business itself.... If public education is to survive into the next century, it must recreate itself from the inside out..."

Clearly, Cook is creating a scenario in which the need for change in education is both urgent and compelling. His mechanism for managing and guiding this process to bring about fundamental change in public education as an institution is strategic planning.

What, then, is strategic planning for America's schools? Cook (1988) explains strategic planning as:

> an effective combination of both a *process* and *discipline* which, if faithfully adhered to, produces a plan characterized by originality, vision, and realism. The discipline includes the vital ingredients of the plan itself; the process is the organizational dynamic through which the vital ingredients are derived. Both the discipline and the process are aimed at *total concentration of the organization's resources on mutually predetermined measurable outcome.* " (p. 93) (italics from the original)

In Cook's view of strategic planning its central purpose is "the identification of specific desired results to which all the effort and activity of the organization will be dedicated....(T)he success of any plan is determined only by the results it produces."

The components of the definition offered by Cook outline an approach that entails a fundamental redistribution of decision making responsibilities, particularly in the area of basic policy development. He believes that planning is a simultaneous top-down, bottom-up process, and that people at all levels of the organization are equally qualified to participate in the planning process.

Shirley McCune, in her book Guide to Strategic Planning for Educators (McCune 1986), echoes many of Cook's sentiments, and presents an approach that is similar to Cook's in many ways. She does offer some cautions, however: "Experience with strategic planning suggests that it may have either minimal impact on a district or be a catalyst for district transformation." She sees the power of strategic planning in its ability to go beyond a series of planning procedures, to "create dissonance in people, upset old views, identify new possibilities, and pose new questions." Not only is strategic planning a rational planning process; it is an

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[3] The best examples of this can be seen in McCune (1986), and Cook (1988).

activity that has "strong psychological effects on an organization and the people involved in the process."

She differentiates between long-range planning which typically begins with the assumption that the organization exists in a stable environment, and strategic planning which attempts to establish the organization's role within the context of a larger society that is changing constantly, based on data collected internally and externally.

Her definition of strategic planning emphasizes its use as a tool for transforming schools:

> Strategic planning is a process for organizational renewal and transformation. This process provides a means of matching services and activities with changed and changing environmental conditions. Strategic planning provides a framework for the improvement and restructuring of programs, management, collaborations, and evaluation of the organization's progress. (p. 34)

Bryson and Roering (1988) offer a different perspective on strategic planning, based on a study of the initiation of strategic planning by governments. They emphasize the difficulty of planning strategically in public entities:

> The deliberate attempt to produce change is probably the greatest strength and weakness of strategic planning as a process. Changes in organizations normally occur through disjointed incrementalism or "muddling through" (Lindblom 1959, Quinn 1980). Any process designed to force important changes, therefore, can be seen either as a highly desirable improvement on ordinary decision making or as an action doomed to failure. Indeed, whatever the merits of strategic planning in the abstract, *normal expectations have to be that most efforts to produce fundamental decisions and actions in government through strategic planning will not succeed.*...Further, because of pressures for public accountability, decisions ultimately are likely to be made at the highest levels (Hickson, and others, 1986; pp. 117, 203), while political rationality dictates that top decision makers not make important decisions until forced to do so (Benveniste 1977, Benveniste 1972, Quinn 1980). (italics from the original)

These varying perspectives on strategic planning contain within them a number of questions of fundamental importance to educators who apply strategic planning techniques to their school districts. Is it the most appropriate planning technique for public entities? Is the process more important than the product? Can it be used to point the way toward fundamental change, or are incrementalist tendencies too strongly ingrained in educational organizations?

Planning Models and Paradigms[4]

Friedmann and Hudson (1974) identify four major intellectual traditions in planning theory. These include: Philosophical Synthesis; Rationalism; Organizational Development; and Empiricism. Planning is seen as a process to link knowledge with action. It is both professional activity and social interaction and

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[4] This section draws from Adams, D. (1991). Planning Models and Paradigms, and Hamilton, D. An Alternative to Rational Planning Models. In R. V. Carlson & G. Awkerman (Eds.), Educational Planning: Concepts, Strategies, Practices (pp. 5-47). New York: Longman; and Benveniste, G. (1989). Mastering the Politics of Planning. San Francisco: Jossey-Bass.

serves to link knowledge and authority, to translate concepts, ideas, and information into practice via organizational implementation processes.

Philosophical synthesis encompasses the work of Etzioni (1969) and Friedmann (1978, 1984) who view planning as a social process primarily. The philosophical synthesis perspective "seeks insights into the social, economic, and ethical conditions as well as the environmental contexts of the institution or sector for which planning is being undertaken" (Adams 1991).

Rationalism has been the dominant approach to planning theory, with its view of people as a utility and human relations as an instrumental process. Rationalism assumes that the world is a comprehensible environment and that complex, often contradictory conditions can be understood by reducing them to manageable simplifications, often based on data. Rational planning models are based on temporally-based cycles which emphasize development of goals and action plans, followed by the systematic implementation and regular evaluation of these plans to determine progress toward stated goals.

Organization development traditions in planning are concerned with how to bring about change in organizations. Here people are valued and the human relations dimensions of interaction are emphasized. Planning focuses upon "innovation and attention to change in management style, employee satisfaction, decision-making process, and the general health of the organization" (Adams 1991).

Empiricist planning methods rely to a greater degree upon the analysis of data and the consideration of systems behavior as primary frameworks for understanding planning needs. Empirical approaches are less concerned with issues of planned social change than with systematic problem solving within the bounds of structured rationality. Empirical planning is often conducted by policy scientists or political leaders, and employs systems analysis, cost-benefit analysis, and decision theory. It relies on programming, budgeting, and evaluation of management through methods such as management by objective to control the implementation process.

Most planning models are based upon some combination of objective and subjective social paradigms. The objective paradigm incorporates positivistic assumptions from the physical and social sciences: the subjective paradigm is built around the concept that individuals create their own subjective reality, and that reality must be understood from the perspective of the individual (Adams 1991). To distinguish between these two paradigms, the terms *rational* to describe models based on the objective paradigm, and *interactive* to describe those derived from the subjective paradigm will be employed. An understanding of this distinction between rational and interactive planning models is central to understanding the differing ways in which school districts have approached strategic planning, and the resultant satisfaction participants express with strategic planning. In some ways the choice of planning paradigms, however unconscious, insures substantially the outcomes of the process.

Rational models are based on positivistic assumptions, including the following offered by Hamilton (1991):

- Effective planning depends on the articulation and attainment of clear organizational goals.
- The development and subsequent assessment of planning success can most effectively be undertaken from a systems theory perspective in which the organization is treated as the primary unit of analysis.

- The planning process requires the planner to serve in an objective, value-free and apolitical role. The planner provides technical expertise in the development, implementation, and evaluation of all planning initiatives.
- There is a direct and systematic link between planning and subsequent decision-making processes to ensure that all realistic and feasible options are considered. (p. 24)

In contrast, the interactive perspective assumes that "planning is first and foremost a social and political activity" (Hamilton 1991). In this context, technical procedures and methods are not necessarily ignored, but are recognized as tools with certain inherent potentials and limitations. It is the job of the planner to match the proper tool with the appropriate applications within the planning process: no tool is automatically the right one. The ways in which people interact with the application of the planning tools affects the results of the planning process. Attention to the social processes inherent in planning provides coherence to the use of various technical planning strategies. This helps counteract the tendency for people to reify the organization or become swept up in the illusion of rationality that many planning techniques generate. Moral issues, in particular, cannot necessarily be overlooked as easily when an interactive approach to planning is employed. Malan (1987) describes this social dimension and its uses in the planning process:

> Educational planning can also be analyzed as a social process, during which the techniques and methods used are subject not only to discussion and to methodological and theoretical choice, but also to debate and may be put to political and pragmatic uses. How these techniques are used reveals the consensus and divergence, as well as the cooperation and conflict, that exist between actors whose systems of action reflect the issues at stake in the struggles for influence between the social and occupational groups concerned with educational policy and management. The use of these techniques is not neutral: it depends on the context, on the place of the different actors involved, and on the strategies that they pursue in the decision-making processes. (p.12) (cf: (Hamilton 1991)

In this approach, human beings are assumed to have personal constructions of reality that guide their behavior and decisions. Universal laws to explain organizational behavior are inherently limited by the fact that organizations are nothing more than a collection of individuals whose collective versions of reality constitute "the organization." Planning, then, is not merely a series of sequential activities designed to lead in linear fashion to collective activity, but a continual process of "interaction-interpretation-decision-further interaction-reinterpretation, etc." (Adams 1988) designed to provide greater meaning to the individuals who comprise the organization.

> Within a social-political understanding, planning can serve a variety of individual and collective purposes depending on frames of reference. To one person, involvement in planning may be a way of keeping informed about latest issues and trends. To a second person, participation in planning might provide an understanding of the interpersonal dynamics between major decision makers within the senior administrative ranks. To still another person, active involvement may be viewed as a fast track to promotion. Not all purposes, however, may have positive implications. For example, involvement in planning may be perceived as a ritualistic rite, a hindrance, or a meaningless exercise. Nevertheless, the different meanings and the different purposes that people ascribe to planning will influence how they

interrelate and how they arrive at decisions about specific issues. (Hamilton, 1991; p. 34)

Strategic planning was developed first in the corporate environment, then applied in large governmental agencies, such as the Department of Defense. It moved into the public arena through county and city government and higher education. One of its defining characteristics is its use of broad questions about the organization's current state internally, and in relation to the external environment.

Incrementalism, described by Lindblom (1959) as the "science of muddling through," assumes that decision making in reality is based on a limited number of choices within a rather narrow range that defines the organization's comfort zone of change. Incrementalist approaches to planning have one apparent advantage: agreement on goals is not necessarily a prerequisite to action; agreement on policy is all that is needed. Incrementalism allows situational responses to pressure or interest groups even if overall goals are not clear. Past practice confines and defines the range of options among which a choice is made.

Mutual adjustment is much easier with an incremental approach, since participants in the organization will likely be familiar with both the range of options and the specific action strategy adopted. Predictability is enhanced, uncertainty reduced. New roles take time and energy to learn. Incrementally recasting old roles may be more efficient and effective, so long as the changes required can be accommodated incrementally. And since it is functionally impossible to develop a view that is truly comprehensive enough to serve as the basis for policy formulation, incremental accommodation and adaptation is more pragmatic.

Incrementalism allows informal processes to be validated and considered as legitimate. Such informality can counteract outdated rules and roles more quickly than a formal planning process. Incremental changes actually precede formal organizational acceptance of the changes, and may be institutionalized before policies are changed to acknowledge this reality. This can cause conflict with those in formal leadership positions, particularly those who believe they must approve all departures from established rules and procedures.

As an example of incrementalism, Benveniste (1989) considers the professionalization of teaching by teachers who assume leadership roles in the absence of new policies to validate or clearly define these new roles. This is a "bottom-up" approach to altering the norms and roles within educational institutions. Change occurs gradually, almost imperceptibly, as teachers begin to develop and run more and more programs, and take additional responsibility for policy issues within the school.

Lindblom (1969) argues that leaders are often the least able to make difficult decisions, and can bring themselves to make such decisions easily and quickly only after incremental changes have removed much of the risk of error or political conflict from the decision.

This model is "non-planning as planning." There is no formal role for a planner, since everyone and no one is a planner. This strategy works best in relatively stable environments where there is adequate time for the incremental process to play itself out. It should be noted that not all incremental adaptation is necessarily good for the organization. Many small adaptations can remove an organization's ability to respond to major environmental shifts, or to capitalize upon opportunities. This approach to planning also tends to create an organizational culture with a cynical view of formalized planning approaches.

Method of Analysis and Sample

This paper reports the result of a content analysis of strategic plans from 79 school districts from throughout the United States. A total of 120 plans was received from school districts in 30 states. The study began in 1991 with attempts to gather a representative cross section of strategic plans from school districts throughout the nation. Locating school districts that had developed strategic plans was problematic. There is no agency that might be expected to have a central listing of districts with strategic plans, in part due its recent introduction into public education. Therefore, several strategies were employed to locate districts that had developed strategic plans.

The National Center for Strategic Planning, a bureau within the American Association of School Administrators (AASA), provided a list of over 400 individuals who had participated in strategic planning workshops sponsored by AASA. Letters were sent to all individuals within school districts in the United States. The letter requested a copy of the district's strategic plan, if one had been developed, and any other information necessary to understand the planning process. It also informed them that a questionnaire would be forthcoming.

After this initial group was solicited, the state departments of education in all states were contacted. Letters were addressed to the chief executive of the state educational agency, requesting their help in identifying districts in their state that were involved in strategic planning. Thirty-five states replied, providing information of varying degrees of specificity. Most sent the names of several districts known to be active in strategic planning. Some sent directories of all schools in their state. Others indicated that there was some form of requirement for strategic planning (Utah for example) and indicated that essentially all districts would have plans. Letters were sent to districts deemed most likely to have produced a plan. One hundred-twenty plans were received.

The complete study comprises a two-stage process of data collection. First, a survey/questionnaire was sent to those districts submitting plans. Second, a subset of plans was analyzed on a number of content dimensions. This paper reports the results from the content analysis.*

Plans were analyzed using content analysis and quantitative analysis strategies. The intent was to discover basic patterns that existed within and between plan sections as noted earlier. To accomplish this, individual sections were analyzed first to develop categories or "themes" that reflected common value assumptions. Linguistic analysis was employed to identify significant patterns of language usage that reflected value or goal positions. Comparisons were then made between sections to ascertain the degree to which specific themes or language were present in more than one section. General questions for investigation were derived from the literature on strategic planning that indicated what its purposes should be for school districts, and from the purposes and goals for planning that those writing the plan expressed explicitly. Quantitative analysis using descriptive statistics was conducted on the data generated from the content analysis. This allowed for comparison of categories and identification of trends across plans. Descriptive data from the content analysis were used to elaborate, illustrate, and further develop

* For results from the survey/questionnaire, see: Conley, David. *Strategic Planning for America's Schools: An Exploratory Study.* Paper presented at the annual conference of the American Educational Research Association, San Francisco. 1992. ED345-359

observations derived from the quantitative analysis. The discovery of meaning in the data was informed by the notion of grounded theory (Glaser and Strauss 1967).

Plans were analyzed along dimensions identified from a review of the literature on strategic planning, with particular attention being paid to the structure of strategic plans being developed in educational settings (Barry 1986, Below and others 1987, Bryson 1988, Cook 1988, Kaufman and Herman 1991, Lease 1987, Mauriel 1989, McCune 1986, Scharfenberger 1986, Valentine 1986, White 1985). A review of public education planning models revealed the following general categories present in some form or another in most recommended strategic planning templates for educators: vision statement or mission statement; guiding principles or core beliefs; parameters; objectives; strategic issues. These elements comprise the general dimensions for plan analysis.

A subset of 79 plans from among the 120 submitted was selected for more detailed content analysis. Not all plans were in a form capable of being analyzed. Some might better be described as promotional brochures for the school district, or annual reports, or plans to plan. Those selected for more thorough analysis contained all or most of the key plan components identified previously; mission, core beliefs, parameters, objectives, strategies. The geographical distribution of the plans that were analyzed is as follows:

Alaska	1	Nevada	1
Arizona	1	New Hampshire	1
Arkansas	1	New Jersey	2
California	8	North Dakota	1
Colorado	5	Ohio	6
Connecticut	1	Oregon	3
Georgia	5	Pennsylvania	1
Illinois	4	Texas	7
Indiana	1	Utah	9
Kentucky	1	Virginia	1
Michigan	3	Washington	1
Minnesota	1	Wisconsin	2
Missouri	12		

Analysis and Discussion of the Plan Elements

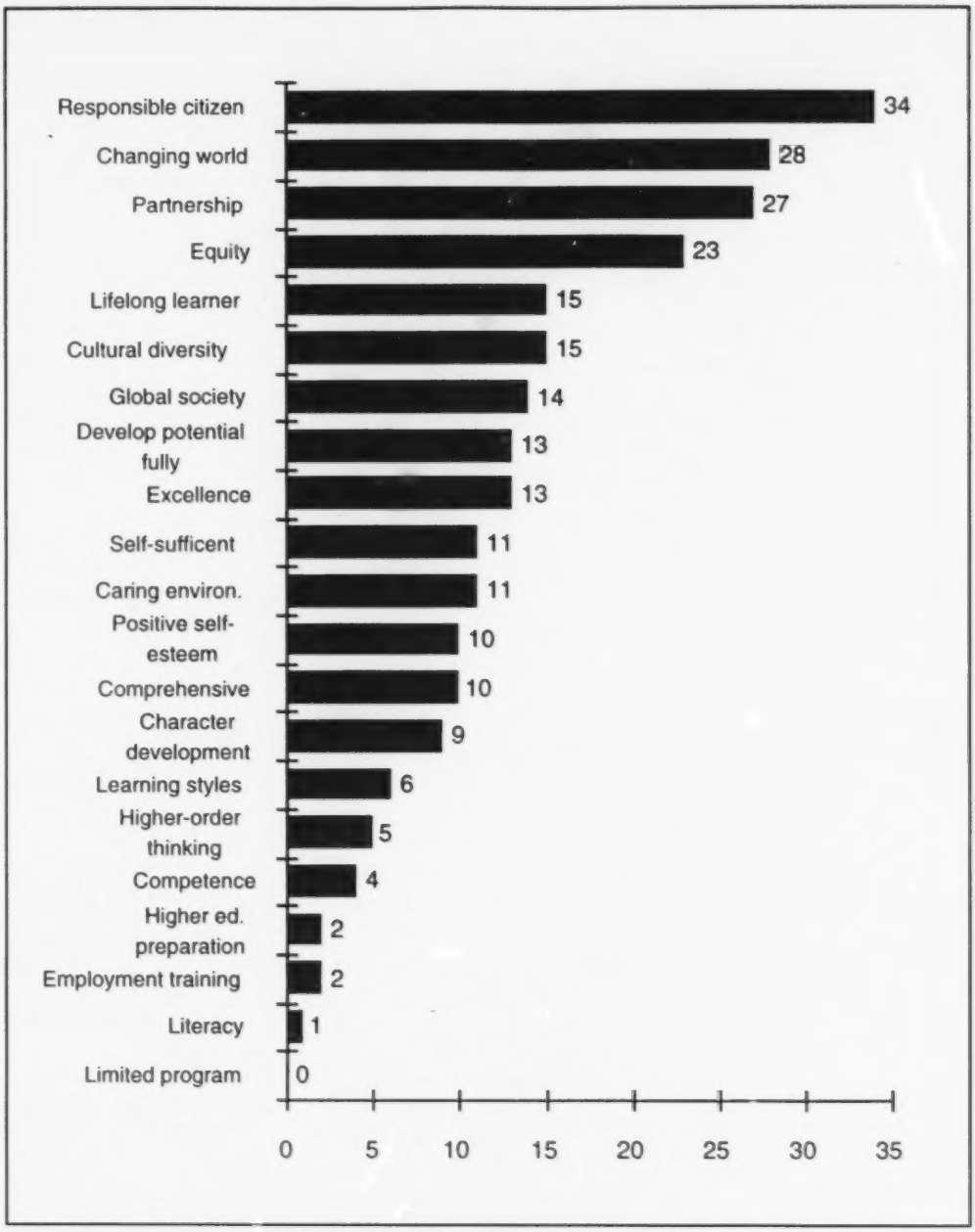
The following section presents the results of the content analysis in graphical form for mission, core beliefs, parameters, objectives, and strategies. Accompanying each graph is a brief discussion of the significance of the data. Following this section is a presentation of principal findings and a more general discussion of strategic planning in education.

A number of questions served as a guiding framework within which the discussion of each element takes place. The questions use to frame the consideration of each element include the following:

- To what extent do the plans address issues of major consequence to the future of education?

- To what extent do the plans address the need to improve student achievement?
- To what extent is technology envisioned as a tool to transform schooling?
- On whom are goals focused? Who is supposed to change; teacher, administrator, student, parent, community, governmental agency? Who is responsible to implement to strategies?
- What is the degree of change, restructuring or adaptation suggested by the strategies selected? Do the activities suggest fundamental change or a restatement of the status quo?
- What is the degree of congruence between and among mission statements, core values, parameters, objectives, and strategies?
- What are the indicators of success, or performance measurements, for the objectives and strategies?
- To what extent are educators attempting to answer questions that may not lend themselves to rational analysis and planning (wicked vs. tame problems (Rittel 1972))?

Mission Statement Keywords



Mission statements tend to be general philosophical statements of intent, rather than mundane descriptions of current practice. They represent idealized outcomes or practices toward which the school system should ostensibly strive. The mission statements reviewed here might best be summarized into a composite statement that would read much as follows:

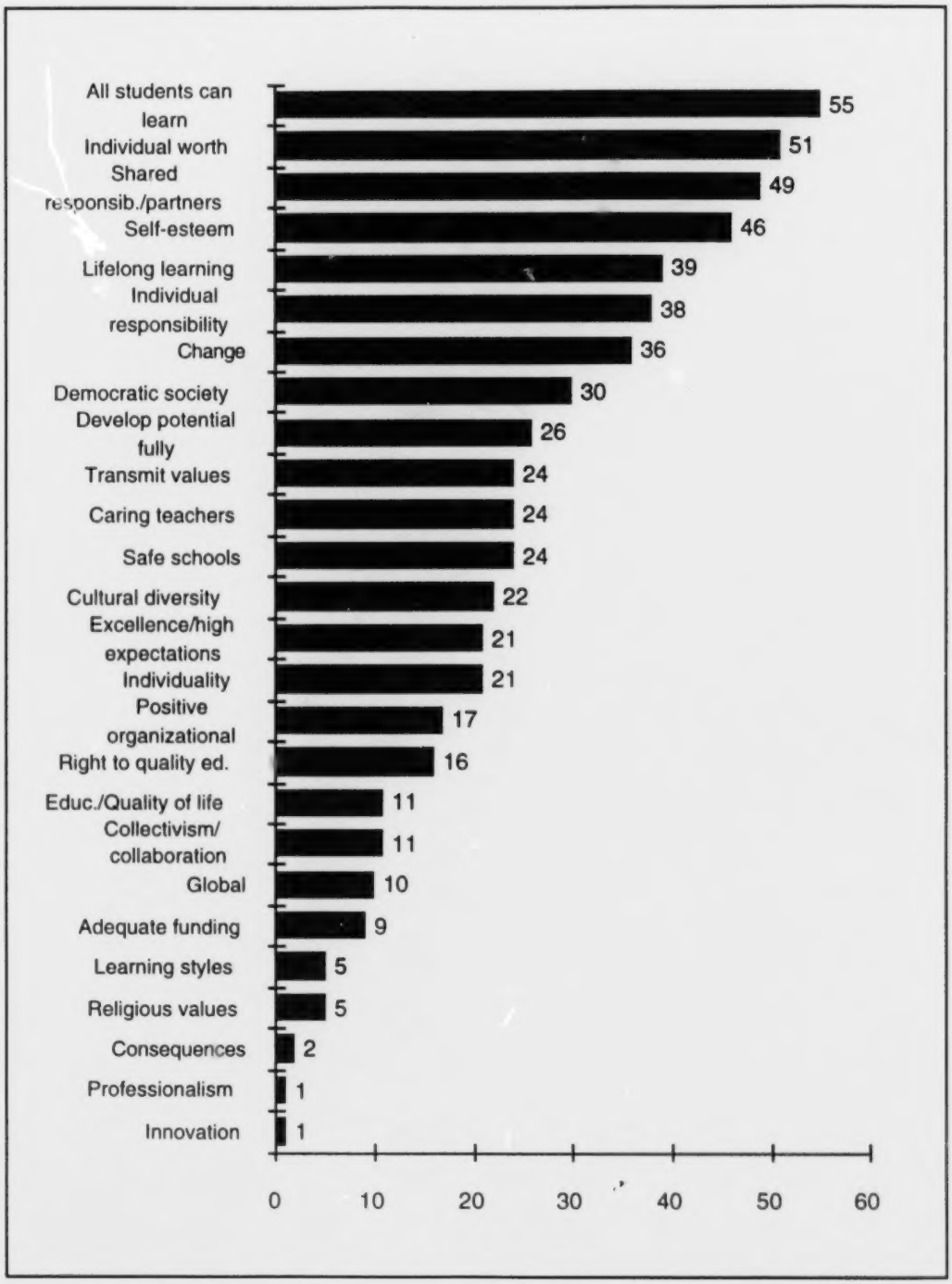
> It is the mission of _____ School District to enable all students to become responsible citizens and lifelong learners in a changing global society. This will occur in an environment where diversity is valued and the potential of each student is developed to the fullest, with an emphasis on excellence in all endeavors. This can only occur as the result of a partnership between and among the school district, parents, and other community members and agencies.

There is very little in mission statements to which reasonable people will likely take serious exception. What is striking is how similar this sampling of mission statements was in many important aspects, even though it was gathered rather randomly from districts throughout the nation. They reflect elements of what has been described as the "new conventional wisdom" (Olson 1992) of what schools should become. In particular, the emphasis on lifelong learners in a changing global society, the importance of respect for diversity, and the notion of community partnerships are recurring themes in discussions of what schools must become. This is not inconsistent with the observations of Tyack (1974), among others who observed that decentralization of educational decision making to the local level still has resulted in the notion of "one best system" of education throughout the nation. If the goal of strategic planning was for local communities to adapt education to their unique needs and circumstances, there is only minimal evidence that this occurred, at least at the level of the stated mission.

It is also interesting to note that traditional missions of education such as custodial care of the young, preparation for college and the world of work are only minimally referenced (Caring Environment, 11; Higher Education Preparation, 2; Workforce Preparation, 2). This reflects perhaps the intention to use the strategic planning process generally, and mission setting particularly, to invent a new future for education, not merely restate the status quo.

The more commonly-appearing elements, such as Responsible Citizen, Changing World, Partnership, and Cultural Diversity indicate an awareness or acknowledgment that schools are subject to their external environments to a greater degree than perhaps has been acknowledged previously. There is a stated intention to ensure that students are prepared to succeed in an increasingly challenging society and world. This may indicating that a rethinking of educational goals and purposes is beginning with a shift from conceptions such as job training and higher education preparation, to broader notions that focus on intellectual processes, thinking skills, group behavior, and other characteristics frequently cited as key to success in the future (Carnevale 1992, Carnevale and others 1990, Commission on the Skills of the American Work Force 1990, Secretary's Commission on Achieving Necessary Skills 1991).

Core Beliefs Keywords



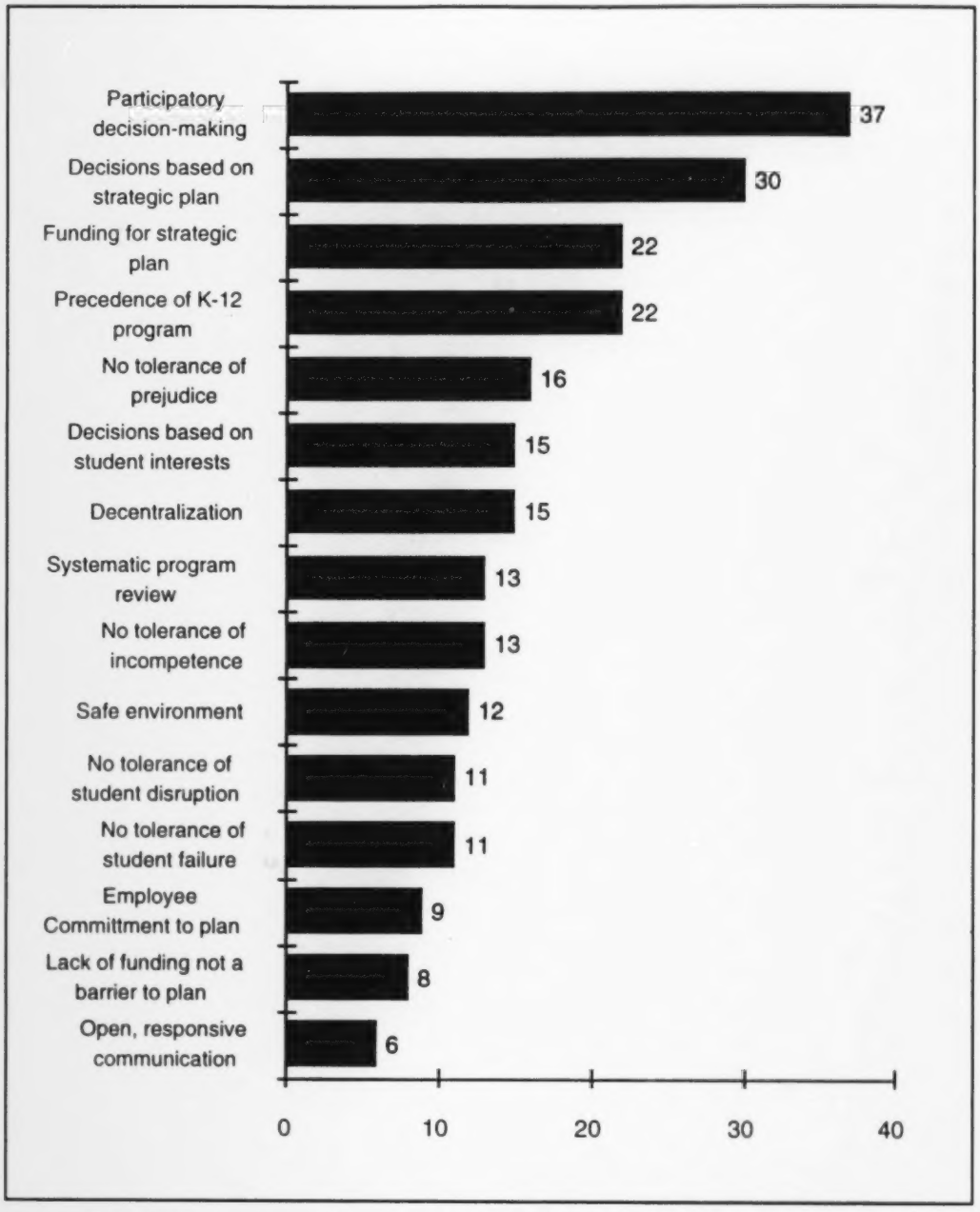
Core beliefs purport to represent the organization's implicit and explicit assumptions regarding how it functions. The surfacing of core beliefs is seen as a critical step to determining the goals the organization chooses to pursue and the responses it will select to achieve those goals.

The most common themes identified were that all students could learn, a belief in the individual worth of all students, that education was a shared responsibility, and that the self-esteem of the learner must be preserved. Other important core beliefs included the following: the organization produces lifelong learners; individuals must take responsibility for their actions; change is a constant and must be accepted as such.

As should be expected, there is considerable overlap between categories stated in the mission statement and those in the core beliefs. In fact, the overlap is so great that there is ultimately some question what the distinction is between these two elements. Both may be statements of core or guiding beliefs. This may be due in part to the difficulty of truly setting a mission in an organization such as a public school system, which is a captive organization and thereby constrained in terms of its mission.

The attempts in the mission and core beliefs to emphasize the value of the individual and to state the importance of the notion of community represent a reaction to the bureaucratic structure of educational institutions. External pressures and changing clientele are combining to put pressure on the traditional isolated, institutionalized structures and assumptions present in schools as bureaucracies. These plans present some examples of how educators and community members, when they meet to discuss the nature of their schools, refer to ideas that focus on individual students (All Students Can Learn, Individual Worth of Each Student, Self-Esteem) as primary core beliefs along with shared responsibility and partnerships in the context of a democratic society. These patterns suggest a concern with re-establishing or re-inventing community rather than refining the practices of the bureaucracy. Such a goal presents an interesting challenge to the entrenched elements of the bureaucracy, which will be called upon to implement the plan eventually. Few of the core beliefs referred to the organization at all (Organizational Climate, Adequate Funding, Professionalism, Innovation). At the same time, the organizational context is critical to actualizing the values and beliefs that were considered most important, those of valuing each individual.

Parameters Keywords



Parameters express the ways in which the organization will respond in order to achieve the goals of the plan. Most common are the related concepts that decision making should be participatory and decentralized. Given that the strategic planning in the public sector is an inclusive process, it is not surprising that districts where this technique is employed would be receptive to broader participation in decision making. This emphasis does raise interesting questions regarding the implementation of the plan, however. While many districts also stated that decisions would be based on their strategic plan, the issue of who is responsible for achieving

the goals of the plan still remained to be answered. Accountability appeared to be diffuse, in part since the goals themselves were so general and, at times, vague.

To develop an organization-wide plan, to involve people widely in its development and implementation, and to simultaneously decentralize decision-making takes careful thought, if accountability is to be maintained. If each unit in the organization constructs its own view of reality, and of the goals of the plan based on this view, as suggested by interactive planning paradigms, the organization must be restructured to accommodate the frequent and intense dialog that is vital to constructing common meaning. Otherwise, little is different from the current state of functioning present in many districts, where each school fends for itself within a framework of common procedures and regulations. Without dialog those less involved in the creation of the plan may tend to have less understanding and ownership of it. As a result they will naturally interpret its implementation in terms of its benefit to or effect on them individually. Interactive planning seems to imply the need for continuous, ongoing review of organizational purpose and values for it to be effective.

Objectives and Strategies

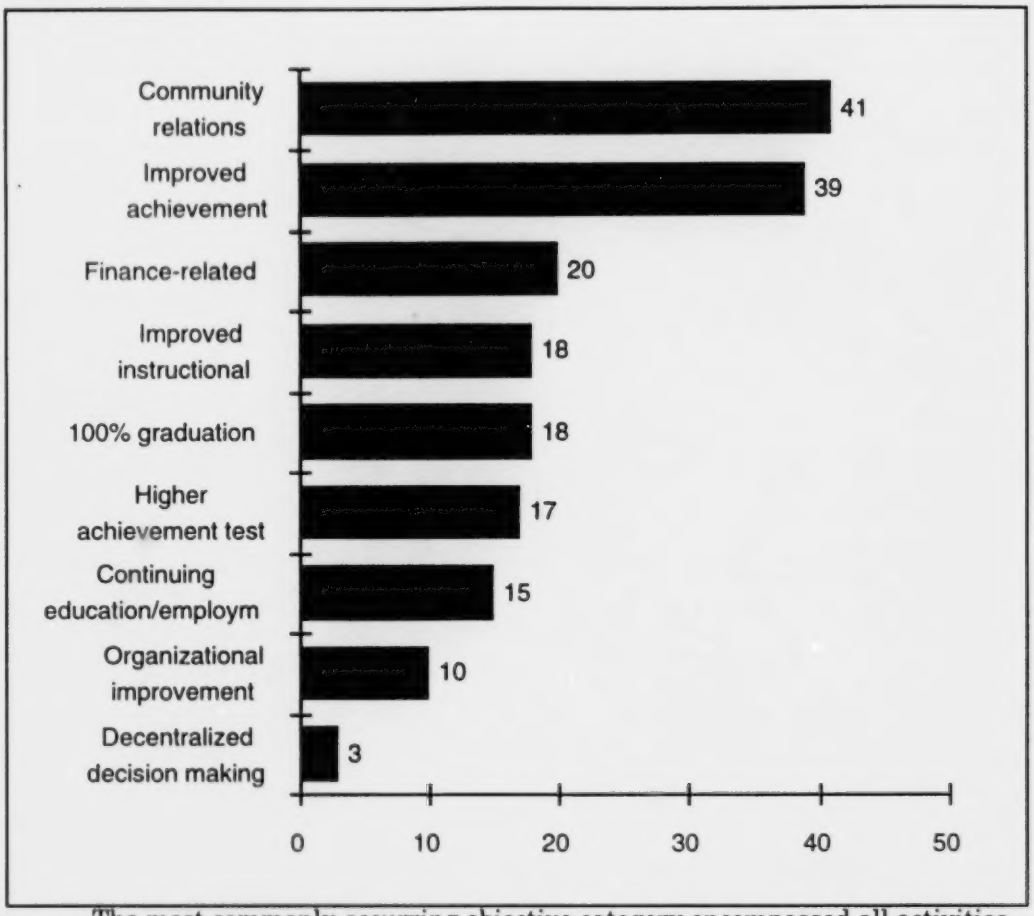
As the planning process moves from mission, core beliefs, and parameters, it enters the arena of objectives, strategies, and action plans. At this level, the likely effect of the organization's plan become clearer, as does its true values and intentions. It may be difficult to discern how the global statements which are found in the mission statement and core beliefs can be carried forward to the objectives and strategies. However, this is a key issue that bears examination. Does a general agreement on and statement of values and beliefs lead to different strategies for change and organizational priorities in practice?

Results from the survey indicate central office administrators were ambivalent about the degree to which planning created internal alignment. In fact, they seemed concerned that school sites might act more independently as a result of the plan:

> While viewing planning as positive in overall terms, respondents were less decisive in their views on whether strategic planning strengthened organizational linkages (50% agree, 43% disagree). This question was designed to determine if strategic planning helped align the organization: did it cause units to feel more a part of an integrated whole? Given the political dimension of planning in the public sector, it was hypothesized that the simple process of planning itself would enhance communication and, perhaps, linkages. By talking about goals, visions, mission, strategic directions, etc., and by seeing one's role in the broader context of the organization, linkages might become more apparent. The power of the "loose-tight coupling" notion of educational organizations may also be at work here. It is possible that at a time of increasing decentralization of decision-making, respondents were indicating that planning enhanced the ability of different units in the organization to make their own decisions to a greater degree. Data presented later will suggest this may be the case. (Conley 1992)

While it is not possible in this study to determine what is actually happening in school districts as a result of the planning process, it is possible to reflect upon what districts said they were going to do to achieve their mission, and to determine if there is substantial congruence, at least on paper. Given this limitation the review of objectives and strategies can offer some useful insight into the ways in which strategic planning is likely to affect educational practices.

Objectives Keywords



The most commonly-occurring objective category encompassed all activities designed to address issues of community relations. This category included a range of activities, some designed to improve community relations, some to develop partnerships between schools and the community. All indicated that the strategic planning process was seen as a vehicle for improving relations and building bridges across the boundaries that have come to exist between community and school. The purposes of these bridges varied widely.

The next most-frequently occurring objective addressed issues of district finances. This meant ways by which the district could stabilize or improve its resource base. It can be seen as being closely related to the most frequent objective, community relations, in the sense that it is also a boundary spanning objective.

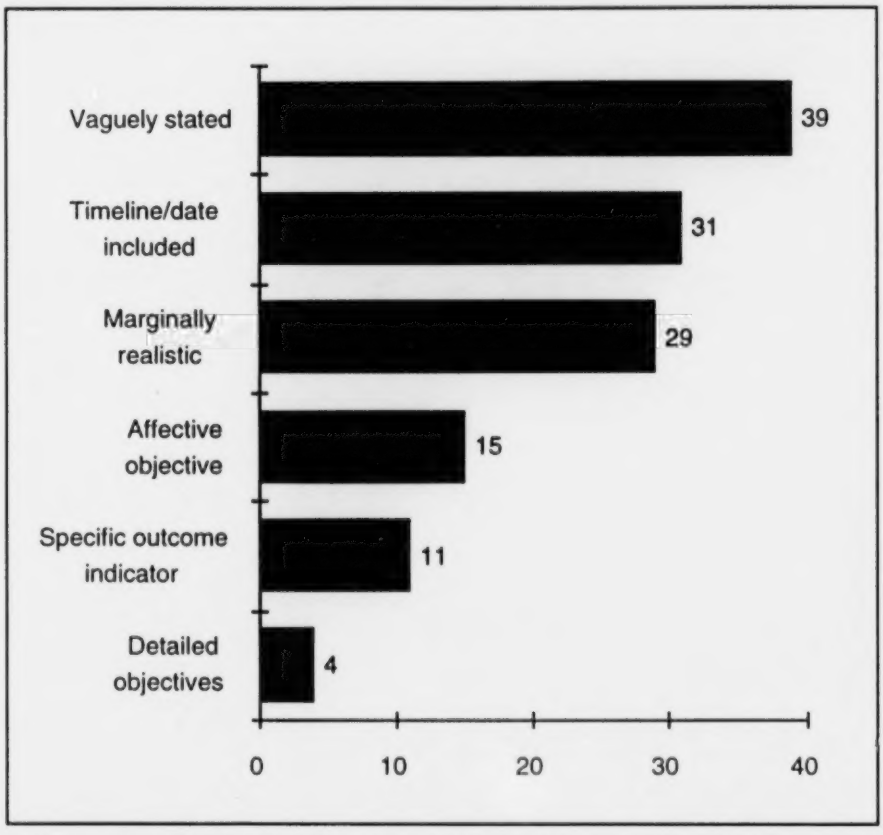
Given that one of the key tenets of strategic planning in public sector organizations is broad stakeholder participation in the process, the objectives that emerged with greatest frequency should not be particularly surprising. Issues of community involvement and of financial support are ones that all participants in the process have in common. Educators and non-educators are on more equal footing discussing these topics than they are when they consider specific programmatic aspects or organizational structures. Furthermore, the planning process itself can be crafted or constructed in a manner whereby enhanced community involvement and access to resources are a natural outgrowth of having key community leaders

present for extended discussions of educational philosophy and practice. Civic leaders may come to see education and its challenges and problems in a new light as a direct result of involvement in developing a strategic plan. These leaders have greater ownership in the plan that results, and are more likely to help create the conditions whereby the goals of enhanced community relations and resource acquisition are achieved. This is not to offer a cynical interpretation that strategic planning is little more than orchestrated and contrived involvement calculated to enable school administrators to manipulate the community. At the same time, it suggests there may be multiple agendas being pursued simultaneously within the process. Results from the survey support this interpretation:

> Responses to this question [The strategic planning process has helped focus the attention of key community decision makers on what is important for the district's future] indicate a high degree of agreement (71%) that the planning process helped decision makers in the community to focus. In the case of those responding to the survey, the planning process apparently created new opportunities for community leaders to become more involved and informed regarding issues of importance to educators. Having a plan to use when talking with community members about district priorities would also seem to be a positive outcome of the process. There is evidence from the narrative responses...that in a number of cases strategic planning helped address very specific issues such as funding, facilities construction, and technology acquisition to enable the district to secure more resources (Conley 1992).

Characteristics of Objectives

In the review of the objectives I also examined the format and structure of them, in addition to their content. This analysis of format looked at how they were constructed to see what this might reveal about the planning process. Results are presented below.



An examination of the objectives left me with several subjective reactions. First was the number of objectives that were stated in very general language. Granted, the strategies and action plans are designed to provide more specificity. However, it is still somewhat striking the level of generality at which many of the objectives were written, as the following examples from a number of plans illustrate:

- Decisions will be made in the best interest of students.
- Professional growth opportunities shall be available to all employees.
- The needs of at risk students will be addressed.
- Changing curricular needs will be addressed.
- Increase opportunities for staff development.
- Address changing facility needs.
- Strengthen parental and community involvement
- The learning environment will be enhanced.

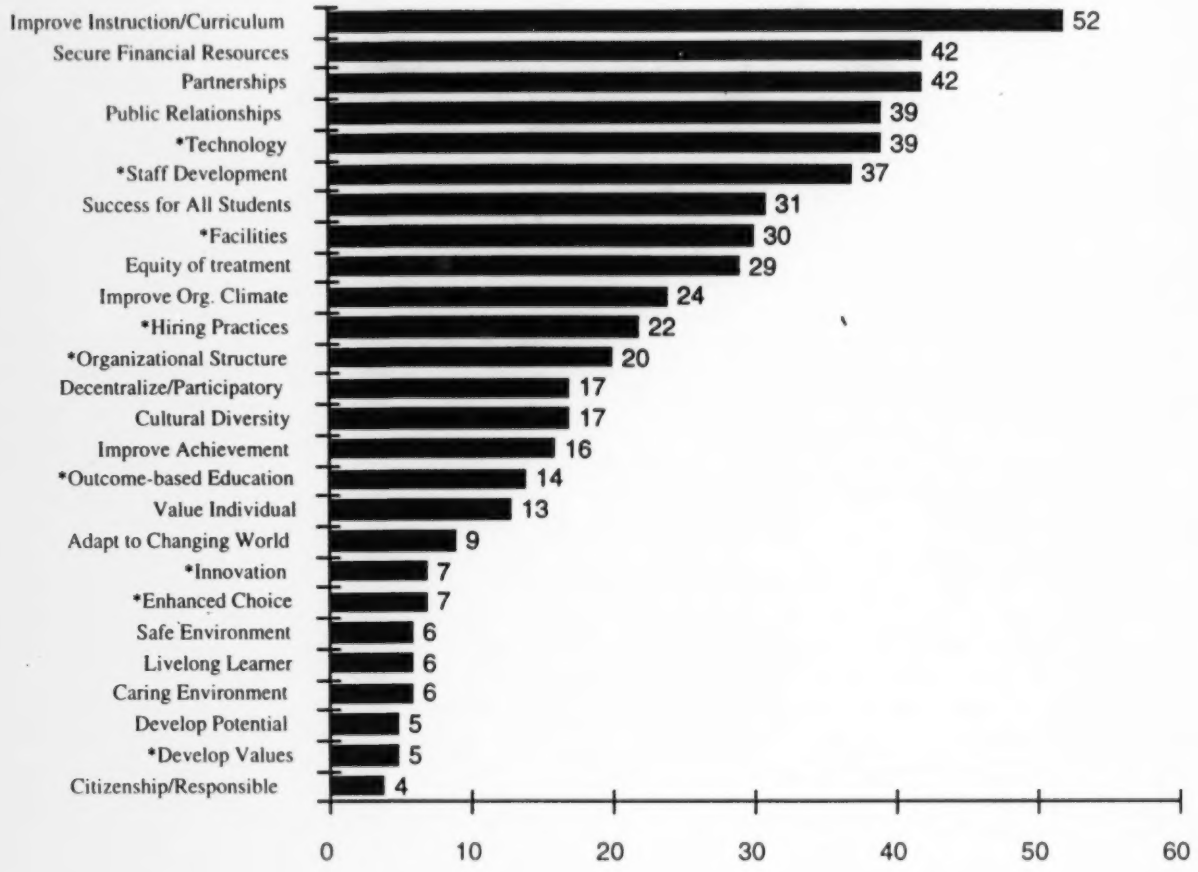
- Every graduate will actively determine his or her own future by exercising choices.
- Students will exhibit a positive attitude toward self, others, and school.
- Students will exhibit appropriate social behavior.
- Students will actively participate in planning for their interests and needs.
- Students will develop healthful living skills.

There is nothing particularly wrong with these objectives, and they may be adequate to frame the strategies and action plans. They do tend to restate many functions and goals which are already assumed to be central to the school system. The question is whether these objectives are sufficiently clear, or sufficiently different, to drive the system in a particular direction, or to cause fundamental change to occur, as many of the proponents of strategic planning suggest will be the outcome of its application to education.

Only eleven had specific outcome indicators and only four were deemed to be detailed enough to provide a sense of whether or not they had been achieved successfully. It should be noted that the strategies did not necessarily contain more detail than the objectives. Therefore, it appears that the action plans were to be relied upon to provide the necessary detail to determine success. The only risk with this approach is that at the level of the action plans there is danger of considerable fragmentation, since the various action teams and individuals who are involved in implementation may not communicate regularly, and may not have as strong of a sense of the overall goals, or objectives, of the plan. In fact, anecdotal reports suggest that this phenomenon has been observed in some school systems where highly detailed action planning and action teams existed and functioned in an environment where there was less clarity on the broader objectives and goals of the plan.

This issue takes on even greater significance if one takes into account the finding that 74 percent of survey respondents indicated that their strategic plan would lead to greater decentralization of decision making in their district. Given that the intent of the plan is to decentralized decision making, it seems even more important to understand and develop clearly the relationship between general statements of intent and specific programmatic responses.

Strategies



The example of a composite mission statement presented earlier suggested that public schools were (or should be) attempting to enable all students to become responsible citizens and lifelong learners in a changing global society, and that this will occur in an environment where diversity is valued and the potential of each student is developed to the fullest, with an emphasis on excellence in all endeavors. Furthermore, districts stated, this can only occur as the result of a partnership between and among the school district, parents, and other community members and agencies.

By examining strategies it is possible to ascertain the congruence between the these statements and the composite mission. Such an examination reveals that it was very difficult to identify strategies that seemed to promote the achievement of several of the elements of the mission, namely responsible citizens, adapting to a changing world, lifelong learners, developing the potential of each individual, and being innovative.

Perhaps districts simply assumed that these goals were subsumed within specific strategies and approaches. However, the examination of the written material failed to make many of these connections. This is worth noting, since these same written materials would be all the information that many, perhaps most, teachers and parents would have to inform them of the goals of the strategic plan and the expectations the plan held for their behavior.

Three of the most commonly-occurring strategies are concerned with resource acquisition and boundary spanning: Secure Financial Resources, Partnerships, Public Relations. This suggests the planning process is being operationalized as a way to attain resources, enhance communications, or improve relations as one of its primary goals or purposes. The planning process and the resulting plan appeared to provide useful formats for communicating with parents specifically, as results from the survey suggest:

> While respondents expressed the belief that all groups felt the plan would lead to significant improvement, they felt most strongly that parents believed that strategic planning would lead to an improved school district. Just over half strongly believed this, and a total of 90 percent agreed with the statement. Apparently districts have been able to inform parents of the outcomes of the planning process in a way that leads parents to be more positive in their perceptions of the district's future. Many of the planning documents that were submitted for this study were in the form of brochures that had obviously been widely distributed within the school community. The strategic planning process seems to provide a vehicle for the promotion of the district's future plans and needs in a way that parents can understand, and to which, apparently, they respond positively. (Conley 1992)

The most commonly-stated strategy, Improve Instruction and/or Curriculum, is problematic in some senses. Improvement of curriculum and instruction is an activity that might reasonably be expected of all school districts. It is difficult to discern if the energy and effort devoted to strategic planning is justified if one of the primary results is to reaffirm or focus upon an activity that would (or should) be likely to take place in any event.

It is possible to argue that the quality and focus of program improvement is increased drastically as a result of the planning process. Examination of the action plans that accompanied many, but by no means all, of the plans submitted, did not suggest that districts were pursuing highly innovative or original approaches to curricular and instructional improvement. An unanswered question here is whether the improvement process in many districts is so nonexistent, unstructured, or rigidified that strategic planning created a chance to develop an entirely new perspective on improvement. If this is the case, it represents a significant step forward. However, it also represents a commentary on the limited capacity for systematic improvement that may be present in many school districts.

It might be argued that the strategy of securing additional technology addresses the goals of lifelong learner and ability to adapt to a changing world. But, once again, there is scant evidence in the strategies themselves or in representative action plans that technology will be used in ways designed to pursue these goals. Most strategies are nothing more than general statements indicating that technology should be incorporated into all aspects of the district. The specific uses are not generally identified, and when they are identified they tend to be of the sort which educators have employed during the previous decade, primarily computer labs or individual computers for classrooms. There was little evidence of systematic planning beyond this level.

Nearly half of the plans recognized the need for systematic staff development as a key strategy for success. By implication, one wonders how the strategies contained in the other plans that made no mention of staff development will be achieved in the absence of programs of staff development, particularly when instructional improvement was such a common theme.

The strategy Success for All Students generally meant the district was committing to some form of mastery learning or outcomes-based education as a way to ensure that all students were able to master a particular body of knowledge and intellectual and social skills. Along with Equity of Treatment, the last of the frequently-occurring strategies that focused rather directly on learning and students, these strategies referred to programs for at-risk students and general statements of intent that the needs of all students would be met. Outcome-based education was identified by name as a strategy in 14 plans. And, while the improvement of instruction and curriculum generally was a stated strategy in 52 plans, strategies that focused more tightly on improved student achievement were identified in 16 plans*

One aspect of the strategies districts selected that is not apparent in this analysis is the sheer number of them that many districts committed themselves to pursue. It was not unusual to find plans with over 20 strategies, each a major undertaking in itself. As statements of intent they were impressive in their scope and their intent to transform district practices. They were also daunting when one considered the amount of organizational change necessary to achieve any one of them individually, let alone all of them collectively.

Principal Findings and Discussion

Findings indicate that districts have not resolved the issue of whether strategic planning is a technicist, political, or consensual process (Carlson and Awkerman 1991). School districts do not make these distinctions in practice. In other words, the plans tend to have elements of all three dimensions simultaneously: They provide a rational framework within which political processes can be constrained and consensus can be pursued. Furthermore, in many cases there is a lack of congruence between the specific actions being undertaken and the broad mission, or vision stated elsewhere in the plan. Plans do not seem to be limiting or reducing the educational mission of the school district, although many districts are undergoing stable to declining enrollment and funding and do indicate they use their plan as a framework for program reductions. Action plans often indicate reaffirmation of the status quo, rather than restructuring of existing practice. The emphasis appears to be on improvement of existing practice (at the level of the strategy statements) rather than transformation of the system.

Survey instruments that were distributed in November, 1991 provided an additional perspective on the conclusions reached through the analysis of district plans. The survey instrument assessed the perceptions of key decision makers in the planning, including the district planning "champion" (Bryson and Roering 1988). The results from this survey were reported elsewhere (Conley 1992). This discussion references these findings as appropriate to provide corroboration or additional explanation for points made in this paper.

* It is possible for plans to have both strategies in them. In fact, 14 of the 16 with Improved Student Achievement also contained a strategy related to improving curriculum and instruction.

1. Interactive planning methods need an organizational context that supports continued dialog and conversation. This allows everyone associated with the organization to define the plan in both individual and collective terms. Absent such opportunities, individuals naturally interpret the plan strictly in terms of personal perspectives. This need for time and structures that generate dialog and conversation differentiates interactive planning from rational models, where the assumption is that once the plan has been written there is little need to discuss it further. The emphasis shifts to monitoring, not meaning-making.

Each method would seem to have its appropriate uses, given the culture of the organization and the objectives of the planning process itself. Educational organizations might benefit from careful thought to the purposes of planning and its desired effect on the organizational structure before deciding which approach, or combination of approaches, to adopt.

2. Strategic planning does seem to be a useful tool for communicating across traditional boundaries between schools and communities. The high recurrence of strategies that address partnerships, public relations, and securing financial resources indicate the importance of this dimension of the planning process. School leaders appear to be conceptualizing strategic planning as a means by which to harness broad-based involvement for the purpose of improving current practices while recruiting more community support for the school system. Strategic planning appears to be seen as a tool for resource attainment as much as for organizational restructuring, although it should be noted that there is a great deal occurring simultaneously when districts decide to plan strategically. In this regard, it is a tool to move from closed-system to open-system conceptions of district functioning.

Strategic planning, then, was valuable as a tool to create greater awareness of the needs of the school district, to promote resource acquisition, and to provide a platform for promotion of the district to parents.

3. The difficult task of carrying through the lofty goals and sentiments expressed in the mission and core beliefs to the objectives and strategies appears to be one that has not yet been mastered in the context of the interactive planning models most districts employ.

There is evidence to suggest that districts operationalize strategic planning in incremental terms, that as the planning becomes more specific and closer to the operational level, the responses come to resemble more closely existing practices and methods, and to operate within existing structures. Therefore, an ambitious goal such as preparing students for a changing world becomes operationalized as a curriculum review project, or new textbooks. These responses are within the current world view of the organization, and allow it to adapt incrementally to strong external pressure for rapid change.

This may represent the weakness combining interactive/political dimensions of planning (mission, core beliefs, parameters) with technicist elements (detailed, fragmented action plans) at the operational level without adequate mechanisms to link the two.

4. There are some inherent contradictions, or conflicts of interest, present in a process which is managed by an entrenched bureaucratic structure, but seems to lead to conclusions and goals that might tend not to further the interests of that bureaucracy. Survey results indicated that strategic planning was initiated by the superintendent more than twice as often as any other source, and that either the superintendent or deputy superintendent served as "champions" of the planning process in almost all cases.

Beyond obvious issues of power redistribution that are inherent in opening up the goal-setting process to broad- based participation, there is a question of how effective strategic planning can be when it is initiated, for the most part, by the superintendent and central office staff, and is under their control. The values expressed by the plans suggest a client-focused and driven organization. Such organizations imply less central control and direction and a diminished role for bureaucratic procedures, such as standardization of procedures and job specifications. In this regard, teachers' associations might also find the results of strategic planning to be threatening. Do these groups align after the plan is developed to alter or modify its implementation such that it does not come to threaten the established interaction patterns within the organization?

5. Strategic planning attempts to walk a delicate line between interactive/political elements of planning that demand broad-based participation and agreement on general principles and goals, and rationalist elements that require adequate detail and measures to ensure plan implementation. The planning process, with its emphasis on global perspective and consensus decision making, tends to produce rather general statements of intent. There frequently is some point in the process where the plan makes the leap from general to specific. Often this leap is not gradual, nor articulated. The broad goals and intentions appear to lose something in the translation into specific activities designed to transform educational practices, and the result is a series of distinct, often unconnected, educational improvement activities. These activities are relatively amenable to rational elements of the planning discipline, but seem to leave out much of the intent and flavor that was imparted during the interactive/political phase.

Clarity of focus and mission seems even more important at a time when many organizations are attempting to decentralize decision making. Developing a strategic plan with the right balance of clarity and focus along with adequate flexibility to allow for its adaptation and implementation locally seems to be a challenging, albeit possible, undertaking.

Next Steps in Research on Strategic Planning

These findings suggest that strategic planning has the potential to be a valuable tool for managing organizational change and boundary-spanning, that it can help school districts create new visions of themselves. The findings also suggest that the transition from the general to the specific, from the interactive/political to the rationalist, is difficult. Additional research is needed to analyze in more detail the action plans and their relationship to other plan elements. Further study is necessary to determine how action plans are operationalized and the degree to which decentralization facilitates problem solving within a framework that addresses district goals and priorities.

This line of research might utilize more focused case studies within a general conceptual framework of the sort suggested (though developed incompletely) in this paper. More evidence of the effects of strategic planning over time is needed before any judgment can be reached regarding its efficacy. It may reshape district attitudes toward planning, toward involvement in decision making, and toward the improvement process in ways that are subtle but sustained. It may create a context within which more fundamental changes can be examined, considered, and eventually realized. This study and the one that preceded it are very much "first passes" at the issues that surround strategic planning in American schools. I would hope they raise as many questions as they answer.

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